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ABSTRACT

The handbook is part of a series on legal services for the elderly which can be provided by senior citizens functioning as paralegals. It presents interviewing techniques to be used in the legal setting and is designed to provide additional information which could not be included in the accompanying film. The document consists of 12 sections based on comments on the film together with discussion and questions under the following headings: (1) film overview, (2) opening the interview, (3) explaining the role of the legal assistant, (4) getting the client to talk about his problem, (5) expressing concern for the client's predicament, (6) exploring the client's social situation, (7) focused fact-gathering, (8) handling client's feelings, (9) getting the consent of an informed client, (10) promising success and giving legal advice, (11) closing the interview, and (12) epilogue. A discussion of issues involved in determining disability under the Social Security Act and a bibliography conclude the document. (EC)

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paralegal interviewing:

fact-gathering & the human perspective

trainee's handbook

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PARALEGAL INTERVIEWING:
Fact-Gathering and the Human Perspective

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PREFACE

This handbook for trainees, a companion handbook for trainers, and a film comprise a packet designed to teach interviewing techniques in a legal setting. This packet is part of a training series being developed by the California Rural Legal Assistance Office or the National Senior Citizens Law Center. The funding for the series came from the Administration on Aging, Department of Health, Education and Welfare, through the National Paralegal Institute of Washington, D.C.

The purpose of the series is to train older persons as paralegals. The term paralegal refers to a person who assists a lawyer in the delivery of legal services. Other names include legal assistant, legal interviewer, lay advocate. The long-range goal of the agencies involved in the funding and development of these materials is the promotion of new careers for older persons and the expansion and improvement of legal services for the elderly.

Other components in this series are:

1) a handbook and film on how to set up a legal services office using older persons as paralegals in delivering legal services to the elderly;

2) a handbook and film on an administrative hearing in the Social Security system, including substantive material on the regulations and statute governing Social Security Disability;

3) written material on Medicare and on the new federalized welfare program for adults called "Supplemental Security Income."

INTRODUCTION

Skill in interviewing is the key to the effective functioning of a paralegal, whether the goal is to secure facts from a client or from a representative of an agency. Some lawyers and paralegals think that interviewing is an easy process. Actually an interview is a dynamic, subtle interaction between two or more persons and the eliciting of information takes considerable skill. Techniques or principles of interviewing can be formulated and taught, but the skill in application comes only from experience over time with on-going supervision.

In designing this packet on interviewing, the unique nature of the interviewing process became the prime consideration. **The film was seen as the primary teaching tool, with written material for trainees and trainers being supplemental to the film.**

The Film

The film "Paralegal Interviewing: Fact-Gathering and the Human Perspective" is a 30 minute 16 mm. color film. **It is designed to demonstrate principles of interviewing through an actual interview and through the use of a commentator who highlights important issues during the course of that interview.**

The problem presented by the client is his inability to work in his usual occupation due to injury to his legs. He has applied for Social Security Disability benefits and has been turned down. This is his first contact with this legal services office, although his eligibility for legal services was determined by the receptionist over the phone.

The initial interview was chosen to be filmed because of its critical importance in the ultimate delivery of legal services. The stage is set through that interview for follow-up interviews, as well as for other related activities, such as investigation, negotiation, and representation.

The Two Handbooks

The Trainee's Handbook is designed to provide additional information which could not be included in the film, without disrupting the flow of the interview. The basic format of this Handbook follows that of the film. There are twelve comments in the film, which have been transcribed and placed in this Handbook under appropriate headings. Each comment is followed by a discussion and elaboration of important issues, and by a series of questions to be answered by the trainee. The Appendix includes a section called "Issues Involved in Determining Disability under the Social Security Act" and an annotated bibliography.

It is recommended that the trainee read the section "Issues Involved in Determining Disability under the Social Security Act" before viewing the film. This will provide a frame of reference within which to better understand the questions asked by the interviewer in the film.

After the film is seen once, the trainee should read the entire Handbook and answer the questions. The trainee might want to view the film again, in order to pick up on some of the issues discussed in the Handbook. It would then be important to move ahead and utilize other training devices which are outlined on page 26 of this Handbook.

If a trainer is available, the accompanying Trainer's Handbook might be useful in terms of designing a total curriculum. **The Trainer's Handbook is intended to supplement both the film and the Trainee's Handbook, and focuses on ways to use those materials in a program designed to teach interviewing techniques.** This includes training techniques and a suggested curriculum, and should be useful for a person in the trainer role who might not have had extensive training experience.

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FILM COMMENTS, DISCUSSION AND QUESTIONS

Film Comment #1 **Film Overview**

This is a film about the skills needed to be an effective interviewer in a legal setting. You'll be watching an initial interview in a legal services office. The paralegal interviewer will be Clarissa Ward and the client will be Jack Keefauver. My name is Wanda Collins, and I will be the commentator. Now I'd like to say a few words about the purpose of the initial interview.

The primary purpose is to define the problem and to gather sufficient information so as to be able to draw up a plan of action that is mutually agreeable to both client and interviewer. Thus, there is a heavy reliance on fact-finding and fact-analysis. Of course, in order to know what questions to ask, you must have knowledge of the relevant areas of the law.

Now, as if that wasn't enough, there is still another dimension to interviewing that is equally important. Many clients come to law offices as a last resort. They have often tried to handle their own problems and have failed. Thus, they come with bruised feelings and hurt feelings. Often times they are very sensitive to either fancied or real slights. So, in my opinion, **an interviewer can be a successful gatherer of facts, but if, in gathering those facts, he violates the client's sense of pride and dignity, that interview is a failure.**

Now I would like you to watch as Clarissa Ward interviews Jack Keefauver, and notice particularly the way that she investigates the facts, and also observe the quality of the interaction.

Questions

1. *Did Mrs. Ward gather the facts needed to make an assessment of the problem? What were those facts and what was the problem?*
2. *Did Mrs. Ward exhibit a knowledge of the relevant area of the law?*
3. *Did a plan evolve which was mutually agreeable to Mr. Keefauver and Mrs. Ward? What was that plan?*
4. *Was Mr. Keefauver's sense of pride and dignity violated?*
5. *Was the interview a "success" in terms of the goals outlined in the introductory comments?*
6. *Would you go to Mrs. Ward for help?*

Opening the Interview

Film Comment #2

> **Mrs. Ward has used several techniques to put her client at ease. She greeted him at the door, offered him a chair, and, finally, got him a cup of coffee. Note also that she had his chair placed so that the desk is not a barrier between them. These techniques not only put the client at ease, but relieve the tensions of the interviewer.**

Discussion

The initial goal of the interviewer is to establish trust and rapport with the client. Obviously this goal is not realized in the first few moments of an interview. However, first impressions are important in either facilitating or hindering the initial gathering of information.

Those first impressions are often created without saying anything, due to the difference between client and interviewer in life-style because of age, sex, ethnicity, class, political ideology. Interviewers are not always aware of the negative impact they have because of their dress, their general demeanor, or the art they use to decorate their office. This does not mean that the interviewer cannot be of help to the client. It does mean that the interviewer should be aware of the image presented, and what effect this might have on the confidence of the client. One way to close that gap of confidence is through exhibiting understanding of the particular life-style of the client. For example, elderly clients have a slower pace of life, thus allowing them more time to collect their thoughts, and to tell their story is important. They also are appreciative of the common courtesies, such as Mrs. Ward exhibited in the beginning of the interview.

Privacy is another consideration. The interviewing space should provide sufficient privacy so that the client is assured his story will be held in confidence. **Comfort is also important.** A straight-back chair is particularly important for older persons who might have a variety of aches and pains and usually some back trouble.

And finally, being on time for the appointment with the client is important in creating an atmosphere of respect. Obviously, sometimes clients must be kept waiting; when this happens, an apology and brief explanation should be given.

See page 12 for Questions on Film Comment #2.

Questions

1. *In your opinion, did Mrs. Ward succeed in putting Mr. Keefauver at ease?*
2. *What would you have done if you had been the interviewer?*
3. *Were there any differences in life-style obvious from this segment of the interview? If so, what were they?*
4. *Do you think that the seating arrangement Mrs. Ward used helped communication? What are some other possible seating arrangements? What are their advantages? Which one would you feel most comfortable in using?*

Explaining the Role of the Legal Assistant

Film Comment #3

> Clients coming to a law office expect to see an attorney. Thus it is important that the client understands clearly the role of the legal assistant.

Discussion

As a matter of courtesy and professional ethics, a paralegal must explain to the client her role and function within the program, with particular emphasis on her working relationship with program attorneys.

It is preferable to describe the role in **positive terms** that reflect the full range of functions and responsibilities. Such a positive explanation can help increase confidence and reduce tension in the client. If the client's response indicates lack of understanding or acceptance of the explanation, the legal assistant should give a fuller explanation.

Since an explanation given early in an initial interview often is not heard because of the client's preoccupation with his own problems, it might be necessary to check out the client's understanding later in the interview.

Questions

1. *Do you think that Mr. Keefauver expected to see an attorney?*
2. *Do you think that he understood clearly Mrs. Ward's role as a legal assistant? Why or why not?*
3. *What is your understanding of Mrs. Ward's role?*
4. *How does she work with program attorneys?*
5. *Do you think Mrs. Ward's explanation helped increase Mr. Keefauver's confidence and/or helped reduce his tensions?*

Getting the Client to Talk About His Problem

Film Comment #4

> **Asking such an open-ended question permits the client to tell the story in his own way; the role of the interviewer at this point is to listen in a sympathetic manner.** One way to communicate concern is to look the person in the eye and avoid taking notes or shuffling paper. Another way is to wait until later in the interview to ask more specific and personal questions.

Discussion

The type of question one asks determines, at least in part, the response one gets. **There are two basic types of questions, the open-ended and close-ended question.** An open-ended question allows a wide range of responses, and is used to get the client to tell his story in his own way, e.g."Tell me about it."A close-ended question seeks a specific and limited answer, and is essential to information gathering, e.g. "What is the doctor's name?"

Both types have their advantages and disadvantages. The open-ended question is particularly useful in getting a client to open up and tell his story; however, it invites rambling and the possibility of getting information not relevant to the problem. The close-ended question is excellent for getting the kind of specific information that is required for legal interviewing, but if relied on too heavily, it tends to stifle the flow of information from the client. In addition, a client might feel he is being interrogated. This is particularly important with elderly clients, who need time to tell their story.

Questions

1. *Was Mrs. Ward successful in getting the client to talk about his problem through the use of the open-ended question?*
2. *What are the dangers of relying too heavily on open-ended questions?*
3. *Did Mrs. Ward appear sympathetic? In what way?*
4. *Did she look Mr. Keefauver in the eye, or did she look around the room?*
5. *How did she handle note-taking?*
6. *Did she shuffle the papers on her desk and thus disrupt the flow of the interview?*

Expressing Concern for the Client's Predicament

Film Comment #5

> Note how Mrs. Ward's verbal and non-verbal expressions of concern about Mr. Keefauver's predicament facilitate the unfolding of his story.

Discussion

Exhibiting concern for the client can be effective if the interviewer genuinely has those feelings. Sometimes an interviewer will verbally express concern, but the expression on his face, the way he looks around the room, or yawns and sighs, can give a conflicting non-verbal message to the client. Obviously, it is also possible to be so concerned as to be patronizing.

Questions

1. *Describe some of Mrs. Ward's verbal expressions of concern.*
2. *In what ways did Mrs. Ward express her concern non-verbally? Give examples in terms of body posture, gestures, facial expressions and eye contact.*
3. *Were her verbal and non-verbal expressions congruent?*
4. *Did Mrs. Ward appear genuinely concerned about Mr. Keefauver's predicament? Was she patronizing? If yes, explain when and how.*

Exploring the Client's Social Situation

Film Comment #6

> **The interviewer has a responsibility to explore the client's social situation and to educate the client about all available benefits. However, equally important, the interviewer must respect the right of the client to reject these benefits.**

Discussion

One of the most important functions a paralegal can perform is to make sure that a client gets referred to the proper agency for his immediate survival needs. A broad knowledge of community resources and of the various programs for which clients might be eligible is critical for a paralegal to function effectively. **It is important to educate the client about those programs in ways easily understandable,** avoiding legal and/or bureaucratic jargon, e.g. entitlement, ATD, GA.

Sometimes paralegals in their zeal to get everything to which a client is entitled get angry or annoyed at the client for not accepting their recommendations, and thus disrupt the paralegal-client relationship. It is particularly important to be sensitive to this issue in older people, since they are more likely to hold to the "welfare mythology" and the "work ethic."

Questions

1. *Did Mrs. Ward fully explore Mr. Keefauver's social situation?*
2. *What other benefits might Mr. Keefauver have been eligible for which Mrs. Ward did not explore?*
3. *Do you think Mrs. Ward educated Mr. Keefauver on the welfare issue? Do you think there was any shift in his attitude?*
4. *Should she have pursued the welfare issue more vigorously? Why or why not?*
5. *Do you recall any opportunity later in the interview for Mrs. Ward to return to the welfare issue? When was that opportunity presented? What might have happened if she had returned to the issue again? What would you have done?*

Focused Fact-Gathering

Film Comment #7

> Note that Mrs. Ward is framing her questions more narrowly. She is carefully recording the chronology of events, and is beginning to secure the needed medical documentation. She is also highlighting the way that medical evidence can be used to prove disability under the Social Security system.

Discussion

The systematic gathering of facts is important to effective representation of a client. Mrs. Ward has shifted from the open-ended question, so successful initially in getting the client to tell his story, to the close-ended question which seeks specific information and limited answers. She is helping Mr. Keefauver to reconstruct his story chronologically, which not only helps him to recall details, but will also aid her in taking notes and in organizing her information for the record.

Since the gathering of facts is related to the relevant area of the law, it would have been helpful if Mrs. Ward had explained to Mr. Keefauver in non-legal terms the statute governing Social Security Disability, so that he would better understand his rights and also understand why she was asking such detailed questions.

Questions

1. *Do you think Mrs. Ward's use of close-ended questions is appropriate at this time? Is Mr. Keefauver ready to answer such directed questions?*
2. *Do you think Mr. Keefauver understood why she was asking such detailed questions?*
3. *Did Mrs. Ward get sufficient detail about his medical history and about his communications with the Social Security Administration to be able to help him?*

Handling Client's Feelings

Film Comment #8

You will recall that Mr. Keefauver became angry when Mrs. Ward began asking him for his total work history. *She could have avoided provoking his anger by explaining why she needed the work history before she started to quiz him.* **However, once he got angry she was quite skillful in handling his anger. She recognized his right to be angry and did not become defensive or upset. After that sequence, Mrs. Ward was able to proceed with the kind of detailed questioning about Mr. Keefauver's work history that is critical to building a case for Social Security Disability.**

Discussion

This sequence highlights again the need for a legal assistant to share information with the client about the program benefits to which he might be entitled. A simple explanation is required, which links the law to the questions which the legal assistant is about to ask.

Concerning the issue of client's feelings, obviously clients come with a whole range of feelings. **The legal assistant must be sensitive to those feelings, and able to respond to them.** However, since this is not a counseling or psychotherapeutic session, those feelings are dealt with only when they might interfere with the interviewing task. Mrs. Ward was fortunate in having a client so outspoken; sometimes a client will develop negative feelings, not express them, and simply not return to the office for further help.

Questions

1. *How could Mrs. Ward have avoided provoking Mr. Keefauver's anger?*
2. *Do you think that Mrs. Ward's response to Mr. Keefauver's anger was appropriate? How would you handle a client's anger?*
3. *What did Mrs. Ward do to regain the cooperation of her client? What other things could she have done?*

Getting the Consent of an Informed Client

Film Comment #9

> Every paralegal must get his client's signature on the appropriate forms. A clear explanation of purpose and a good sense of timing are important elements in this task.

Discussion

Paralegals have a professional responsibility to make sure clients understand the meaning of the forms they are signing. Clients should be given an opportunity to read over the form and encouraged to ask questions about it. They must clearly understand that no one can represent them unless there is a signed consent, and that information cannot be gathered without an authorization from the client. This provides a good opportunity to explain that all information given by the client will not be revealed to outside sources without the express consent of the client. **Confidentiality is an essential part of the lawyer-client relationship, in which paralegals share because of the attorney supervision.**

Questions

1. *Do you think Mrs. Ward clearly explained the purpose of the two forms that she had Mr. Keefauver sign?*
2. *Do you think Mr. Keefauver understood what he was signing and why?*
3. *From Mrs. Ward's explanation, do you understand the purpose and importance of the "authorization to represent" form?*

Promising Success and Giving Legal Advice

Film Comment #10

> An interviewer must be careful not to promise success. There is a delicate balance between giving hope to a discouraged person and making promises which one can't fulfill.

Discussion

Some paralegals, in their eagerness to help the client and gain approval, **promise success,** even before they have a firm idea about the strength of the client's case. **It is better to restrain that impulse and focus instead on the vigorous fact-finding and investigation that will demonstrate concretely to the client your desire to be of help.**

This issue is related to that of giving advice. **Generally, paralegals cannot give legal advice without the specific sanction of the lawyer.** However, when the law authorizes non-lawyers to represent clients before administrative agencies, such as the Social Security Administration, this authorization includes giving advice in preparation for such representation.

Questions

1. *Do you think that Mrs. Ward made promises to Mr. Keefauver concerning the solution to his problem? How would you have handled this situation?*
2. *Did you think Mrs. Ward was giving legal advice? What are the problems involved in this issue?*

Closing the Interview

Film Comment #11

> Mrs. Ward has successfully involved Mr. Keefauver in preparing his own case. This not only insures his cooperation, but, most important, conveys the message to Mr. Keefauver that he is a competent human being.

Discussion

The process of successfully closing the interview is as important as the process of opening an interview.

The paralegal must explain to the client the options open to him, and their consequences, so that the client can make an informed decision as to what action he wants to take. **The client must understand that it is his right and responsibility to make that decision.** If the client decides that he wants the paralegal to represent him in further action, then the next steps must be explained, within the context of a timetable.

And finally, the paralegal must give the client ample opportunity to ask questions and to clear up any misunderstandings.

Questions

1. *Do you think Mrs. Ward successfully involved Mr. Keefauver in preparing his own case?*
2. *Do you think she was sensitive to his physical limitations in asking him to perform certain tasks in his own case preparation? What would you have done in a similar situation?*
3. *Do you think that Mrs. Ward made the options clear to Mr. Keefauver?*
4. *Did Mr. Keefauver understand that he had the right to select any option open to him?*
5. *Do you think the interview ended on a positive note? Why? How important is such a positive ending?*

Epilogue

Film Comment #12

> **The principles of interviewing that I have been commenting on are generally applicable no matter what the problem the client brings to you.** But sometimes the problem is more difficult to determine, and you might need additional interviews in order to get sufficient information.
>
> Another important point is the personality of the interviewer. **Each person must develop his own interviewing style that is comfortable and natural for him.**
>
> And, finally, don't be discouraged if in the first few interviews you feel ill at ease and awkward. **As you gain more experience, you will also gain self-confidence and your skills as an effective interviewer will improve.**

Discussion

Skill as an interviewer comes with experience in actually interviewing clients over a period of time. Principles can be learned through watching the film, reading the Handbook, and discussion. However, the translation of those principles into skills is a difficult and time-consuming process.

Paralegals can learn these skills in a variety of ways. Ideally, training in interviewing will be part of an intensive training program prior to seeing clients. **Since it is difficult to learn interviewing in a vacuum, at least one area of the law should be learned before focusing on interviewing skills.** An alternative is to have available sufficient information about the relevant law, as was done in this Handbook, to give the paralegal a frame of reference within which to learn interviewing principles and begin to practice interviewing skills.

Other techniques a paralegal can use to learn interviewing skills include participating in role-playing situations, analyzing one's own video-taped simulated interviews, and involving oneself in other related exercises.

As a supplement to formal training, paralegals should seek out opportunities to observe skilled interviewers actually interviewing clients, with time set aside after the interview for discussion. When the paralegal begins interviewing, he should ask a skilled interviewer to observe and critique his interviews.

By using these suggestions, and with good on-going supervision, paralegals can develop their own style as effective legal interviewers.

APPENDIX A

ISSUES INVOLVED IN DETERMINING DISABILITY UNDER THE SOCIAL SECURITY ACT

The purpose of this section is to highlight issues involved in determining disability under the Social Security Act. Understanding those issues will provide a frame of reference within which to view the film "Paralegal Interviewing: Fact-Gathering and the Human Perspective."

This section obviously is not intended to make the reader an expert in Social Security Disability. However, the CRLA office of the National Senior Citizens Law Center is in the process of developing a film and written material on an administrative hearing in the Social Security system. Substantive material on the statute and regulations governing Social Security Disability will be included.

Social Security Disability Insurance

The Social Security Act, through its disability insurance program, provides benefits for disabled workers and their families. Since this is an insurance program, the first issue to be proved is that the worker has insured status. However, this section will not deal with that issue. Instead, the focus will be on the next step, which is proving that he is physically and/or mentally impaired for purposes of the Social Security Act.

The relevant statutory law governing the disability program can be found in 42 U.S.C.A. §401 and following, and the regulations in the Code of Federal Regulations, Vol. 20, §404 and following. The law defines disability as:

> *inability to engage in any substantial gainful activity by reason of any* **medically determinable** *physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.* (42 U.S.C. §423(d)(1)) [Emphasis added.]
>
> *For purposes of this subsection a "physical or mental impairment" is an impairment that results from anatomical, physiological, or psychological abnormalities which are* **demonstrable by medically acceptable clinical** *and laboratory diagnostic techniques.* (42 U.S.C. §423 (d) (3)) [Emphasis added.]

The Social Security Administration recognizes three categories of impairment which entitle a person to disability benefits:

1. Individuals are presumed to be entitled to benefits because they have an impairment listed in the Social Security Regulations (20 CFR §404.1539, et seq.);
2. Individuals are presumed to be entitled to benefits because they have an impairment not listed but equivalent in severity and duration to the listed impairments (20 CFR §404.1505);
3. Individuals who are not presumed to be entitled to benefits, because they do not have an impairment listed in the Social Security Regulations nor its equivalent, and yet whose impairments do prevent them from engaging in substantial gainful activity. (20 CFR §404.1502(b))

The first two categories involve "presumptive disability" and are the surest way to establish entitlement to disability benefits. Therefore, the need to request an administrative hearing and to secure legal representation is often unnecessary. However, the third category of impairment is more complex, and the skills of a representative can be the critical factor in establishing entitlement. The case of Mr. Keefauver, the client in the film, falls into this third category.

"Functional Disability:" Mrs. Ward's Exploration of the Issues

There are four issues that Mrs. Ward must explore in order to prove disability under this third category:

1. total medical evidence of current disabilities as well as illnesses or disabilities in the past;
2. current functioning in everyday life, such as moving about, handling objects, hearing, speaking, reasoning and understanding;
3. how the medical and functional evidence prevents the claimant from working at his usual or equivalent occupation;
4. how the medical and functional evidence prevents him from working at any substantial gainful employment.

Notice in the film how Mrs. Ward goes about getting a detailed history of Mr. Keefauver's medical problems. She focuses her attention on the accident, subsequent operations, the medical opinion of his treating physician on the effect of the injuries, and probes his general medical condition to see if other problems combine to make his impairment even more severe. For example, she questions him closely about the degree of disability caused by his war injury.

Mrs. Ward then moves on to securing information about his current functioning, e.g., she asks him to stand up and walk around; asks him about pain, discomfort and

his ability to sleep; asks him what he is able to do around the house. All of this information is designed to build a case for Mr. Keefauver's disability under this third category.

Mrs. Ward next turns her attention to the issue of work, getting as complete a picture as possible of the different types of work Mr. Keefauver has engaged in, and the degree of training, skill, and physical exertion involved in actually performing such work.

The final step is demonstrating that Mr. Keefauver, because of his physical and/or mental impairments, his age, education, and work experience, cannot engage in any kind of substantial gainful work which exists in the national economy. It should be noted that Mrs. Ward did not get the kind of information about Mr. Keefauver's educational background which would be necessary to counter vocational evidence presented during an administrative hearing.

This interview is obviously just a first step in the task of representation. Further investigation and research will be necessary in order to build the kind of case essential to secure disability benefits for Mr. Keefauver.

APPENDIX B

BIBLIOGRAPHY

Collins, Donnelly, and McAdams. *The Santa Cruz Story. Older People Serving Older People in a Legal Setting.* California Rural Legal Assistance Office of the National Senior Citizens Law Center, 942 Market Street, Suite 606, San Francisco, CA 94102 (1973)

The 63 page handbook, complete with photographs and model forms, describes in detail the steps involved in setting up and operating a legal services office serving low-income elderly through the use of senior citizens as legal assistants. ($2.50 per copy, one copy free to Legal Services Offices.)

A 16 minute, 16 mm color film complements the handbook and gives glimpses of the way the Senior Citizens Legal Services of Santa Cruz, California, operates. ($5.00 for Legal Services Offices, and $10.00 for other agencies; rental fee includes a free copy of the handbook.)

Statsky, William P. *Legal Interviewing for Paralegals,* National Paralegal Institute, 2000 P Street, N.W., Washington, D.C. 20036 (1973)

This text is written for paralegals. It may be studied by the paralegal alone or in a classroom as part of a training program conducted by a paralegal trainer.

The text centers on an analysis of a particular legal interview conducted by a paralegal on a hypothetical case. From this analysis a number of problems, principles and guidelines on interviewing emerge. A bibliography is included. (Cost is $3.00 per copy for Legal Services and $5.00 for other agencies.)

Statsky, William P. "Advocacy and Client Interviewing," in *Teaching Advocacy: Learner-Focused Training for Paralegals,* pp. 52–58. National Paralegal Institute (1973)

This is a text for teachers/trainers of paralegals in advocacy, particularly administrative advocacy where paralegals are authorized by law to represent citizens. A bibliography on training is included. (Cost is $5.00 per copy for Legal Services and $10.00 for other agencies.)

Statsky, William P. *What Have Paralegals Done? A Dictionary of Functions,* National Paralegal Institute (1973)

This text is designed to describe what paralegals have done to date, both in the private law areas and in poverty law. There are 27 sections covering general areas of the law such as administrative law, consumer law, criminal law, trust and estates law, etc. A bibliography is included. (Cost is $5.00 per copy for Legal Services and $10.00 for other agencies.)

PARALEGAL INTERVIEWING:

Fact Gathering and the Human Perspective

Film – 30 Minute, 16 mm Color

The film is designed to demonstrate principles of paralegal interviewing through an actual interview and through the use of a commentator who highlights important issues during the course of that interview. In this packet, the film is the primary teaching tool, with supplemental written materials for trainees and trainers.

Handbooks for Trainees and Trainers

The "Trainer's Handbook" is intended to supplement both the film and the "Trainee's Handbook," and primarily focuses on ways to use those materials in a program designed to teach interviewing techniques. It includes training techniques as well as a suggested curriculum and is designed to be useful for a person in the trainer role who might not have had extensive training experience.

The "Trainee's Handbook" can, of course, be purchased separately or at bulk rate.

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